



Installing Patient Dashboard V4

1. Download the Installation Package

From www.procon.co.nz/wellsouth.html

Unzip the downloaded ZIP file. It contains four folders:

- Forms
- License Update
- SQLs
- Screening Terms

2. Update the Medtech license to allow “PCON” forms to run

Run the executable found in the “License Update” folder. This will add “PCON” as a valid publisher code for both Advanced Form and Dynamic Forms.

3. Screening terms and in-box mapping

Ensure that screening terms exist for:

- Retinal Screening
- Diabetes Foot Risk Assessment
- Albumin Creatinine Ratio
- eGFR
- Serum Creatinine
- BMI

Standard screening terms are available for import within the installation package.

4. In-box Mapping

Ensure that lab test results are being correctly mapped to screening for:

- LDL
- hbA1c
- Urine Albumin Creatinine Ratio
- Serum Creatinine
- eGFR

An SQL is available (in the SQL folder) to assist you:

- “Show Recent Test Results and Mapping” will display test results received by the practice with the most common test result at the top, and the screening term, if any, that the test result has been mapped to.

5. Import the Advanced Forms

Found in the “Forms” folder.

*Setup → Advanced Forms → Advanced Forms Manager
Advanced Forms → Import*

- Patient Dashboard Customise Well South
- Patient Dashboard V4 Well South
- Procon Concepts and Coding Terms

Exit Medtech and sign in again.

6. Check Concept Map

Setup → Advanced Forms → Concept Map
 Publisher = "Procon Limited"

Check that all concepts are correctly mapped. The following concepts are particularly important:

10.2.1.1	Blood Pressure Diastolic Value	
10.2.1.2	Blood Pressure Diastolic Date	
10.2.10.1	Vault Smear Outcome Code	(optional – only if it exists)
10.2.11.1	CVD Risk Value	
10.2.11.2	CVD Risk Value Date	
10.2.11.3	CVD Risk Outcome	
10.2.12.1	Retinal Screening Outcome	
10.2.12.2	Retinal Screening Outcome Date	
10.2.12.3	Retinal Screening Outcome Description	
10.2.13.1	Waist Circumference Value	
10.2.13.2	Waist Circumference Value Date	
10.2.14.1	Diabetes Foot Risk Outcome	
10.2.14.2	Diabetes Foot Risk Date	
10.2.14.3	Diabetes Foot Risk Outcome Description	
10.2.15.1	hbA1c Value	
10.2.15.2	hbA1c Value Date	
10.2.16.1	ACR Value	
10.2.16.2	ACR Value Date	
10.2.17.1	eGFR Value	
10.2.17.2	eGFR Value Date	
10.2.18.1	Serum Creatinine Value	
10.2.18.2	Serum Creatinine Value Date	
10.2.19.1	LDL Value	
10.2.19.2	LDL Value Date	
10.2.2.1	Blood Pressure Systolic Value	
10.2.22.1	Mammography Outcome	
10.2.3.1	Height Value	
10.2.3.2	Height Value Date	
10.2.4.1	Weight Value	
10.2.4.2	Weight Value Date	
10.2.5.1	BMI Value	
10.2.6.1	Alcohol Units Per Week Value	(optional – only if it exists)
10.2.6.2	Alcohol Units per Week Date	(optional – only if it exists)
10.2.7.1	CX Outcome Code	
20.4.1	Diabetes Annual Review Outcome	
20.4.2	Diabetes Annual Review outcome Date	

Other concepts that do not appear in the above list may be left unmapped as they are used in other versions of Patient Dashboard and/or other forms or will default correctly without modification.

Exit Medtech and then sign in again.

7. Check and Update Customisation

Create a new patient on with first name “Patient” and last name of “Dashboard”. Untick “Patient”.

Run the form “Patient Dashboard Customise V4”.

Check that outcome codes are correctly set to “Normal”, “Abnormal”, “Excluded”, “Ignored” or “Declined” for the following entries.

Note:

If they are wrong they must be changed within the definition of the screening term itself (other than for “Declined” which is set in the customisation form).

“Declined” should have an outcome indicator of “Invalid”.

- Alcohol Consumption
- Cervical Screening
- CVD Risk
- Diabetes Annual Review (if implemented)
- Diabetes Screening
- Mammography
- Vault Smear (if defined)

8. Test

- Diabetic patient:
 - ACR
 - Serum Creatinine
 - eGFR
 - Retinal Screening
- Go through a day’s worth of appointments.

9. Training Checklist

- Don’t close dashboard - move it, resize it, minimise it, but don’t close it.
- Resizing. You can hover over the traffic light.
- The meaning of the green, red, yellow, blue and grey traffic lights.
- You can click on the traffic light.
- The date column.
- The green, red, and blue buttons.
- The “info” buttons.
- Conditions of Interest - the pop-up form to add new classifications.
- Highlighting classifications to make them appear on dashboard.
- Quick Links.
- Screen refreshes when you click outside of dashboard and then go back.
- Diabetes management.
- Adding your own notes.

10. For the practice manager

- How to customise Patient Dashboard.
- How to turn on Patient Dashboard for individual staff members.
- The toolbar button for those who don't want it on all the time.

11. Turn on version 4 (when ready):

(You can manually run version 4 [Shift-F3 to run a new form] for testing).

- Setup → Reference Nos...
- “Documents” tab
- Change the dashboard form to the new version.